



# **Air Resources Board**

## **Manufacturer Document Management System (DMS) Training**

# Agenda

## 1. DMS Overview

- Overview
- Components
- Organization
- Resources

## 2. DMS Live Demo

- Log-in
- Uploading a document
- Submitting documents to workflow
- Checking status of the document

## 3. Questions and Answers

# DMS Overview

## What is DMS ?

- System to Track & Store
  - Electronic Certification Documents (pdf, doc, etc.)
  - Electronic Images (jpg, gif, etc.)
- System to Reduce Paperwork and Improve the Certification Process



# DMS Components

- SECURITY

- Protection from unauthorized access
  - Although the system can be accessed by multiple users, documents are only available to authorized personnel
- Protection from tampering/destroying
  - Allows you to keep an unchanged “Master Copy”
  - Electronic format protects against natural disasters such as floods

- WORKFLOW

- Documents submitted to workflow are automatically routed to the correct staff for review
- Version control allows you to track and follow the various changes of a document
- The current status of the document can be tracked by manufacturers

# DMS Organization

- Domains
  - Light Duty (ARB\_ON\_ROAD)
  - Motorcycle (ARB\_HMC\_OFMC\_ATV\_EGC)
  - Heavy Duty (ARB\_HEAVY\_DUTY)
  - Off-Road (ARB\_OFF\_ROAD)
  - On Board Diagnostics (ARB\_OBD)
- Predefined directory structure
  - Assigned document types for each folder
- Users can access all applicable domains with one user ID

# DMS Resources

- DMS Webpage
  - <http://www.arb.ca.gov/msprog/dms/dms.htm>
- DMS User Guide
  - <http://www.arb.ca.gov/msprog/dms/mfrug032707.pdf>
- DMS Tutorials
  - <http://www.arb.ca.gov/msprog/dms/dms2.htm#tutorials>
- DMS FAQ
  - <http://www.arb.ca.gov/msprog/dms/dms-2.htm#faq>

# DMS Live Demo

- Log-in
- Upload a document
- Submit to Workflow
- Check Status

# DMS Log-in

OpenEDMS 3.8

Change Language: English ▼

Enterprise Document and Workflow Management Solution



## OpenEDMS System Highlights:

- Entirely Web Based
- No Training Required
- Simple Implementation
- Enterprise Security

## ► OpenEDMS - User Login

User Name :   
Password :   
Domain :

Sign In

Reset

[Forgot Password](#)

Wednesday, January 4, 2012

## Incorrect Status Name

Wednesday, October 12, 2011

Due to a system update, some files may incorrectly show a status of "N/A". We are currently attempting to restore these files to their correct status. If you have any questions, please contact your certification representative. We apologize for any inconvenience.

-DMS Admin

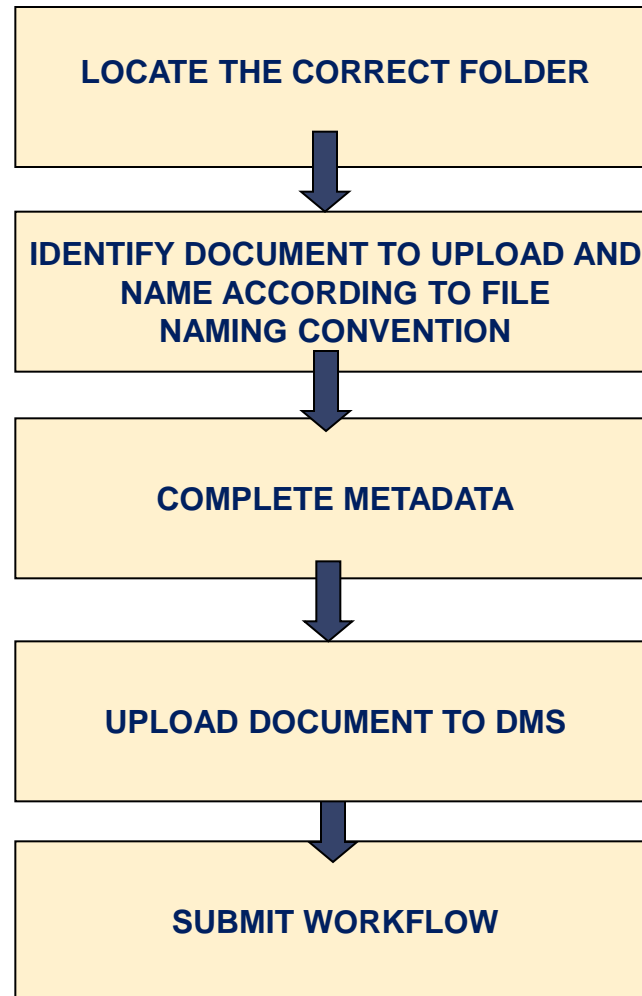


# DMS Log-in

- Things to Remember
  - Your password should be changed once you first log-in (password is case sensitive)
  - Check that you have picked the correct domain before logging in
  - If you forgot your password, the system can reset your password and send you a new one, be sure to pick the correct domain before clicking “Forgot Password”
  - If you are authorized to access multiple domains, you only need one username and password

# DMS

## Steps to Submit a Document



Documents

Workflows

Mail Box

News Board

Calendar

File Browser

Advanced Search

Favorites

Clipboard



- 0 - AMFR HMC Template 2008...
- HMC
  - 2009
    - COMPLETE CBI APPLICATION
      - COMMON INFO
      - ENGINE FAMILY SPECIFIC
        - Engine Family 1
        - Engine Family 2
      - CORRESPONDENCE
      - FOIA APPLICATION

Create

Edit

View

Add

Forward

Set As Home

Signature Log

File Comparison

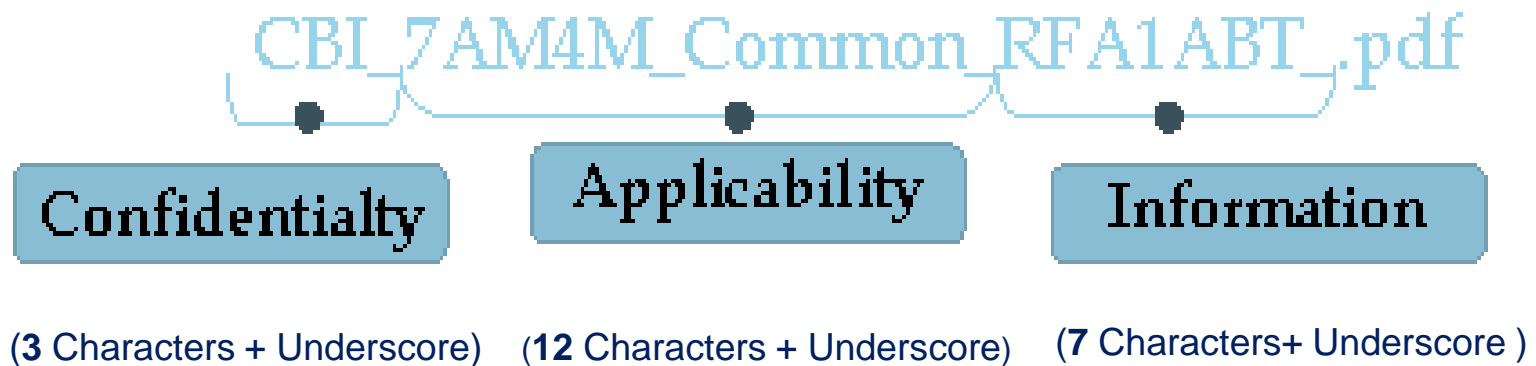
Name	Type	Size	User	Date	Version	Status	File ID
Folder							
File							
Zip File							
Text File							
Template File							
File From Template							
URL							
Forum							
Shortcut							

1 2 3

# DMS – Uploading Documents

- Things to Remember
  - Go to the location in the directory structure where document will be uploaded
  - Click on Create → File, then choose the document from your computer
  - Name the document according to the file naming convention
  - Select the correct “Document Class” to match your document content
  - Complete the Metadata

# File Naming Convention



The file naming convention can be found on our website at:  
[http://www.arb.ca.gov/msprog/dms/filenamingconvention\\_02\\_23\\_2012.pdf](http://www.arb.ca.gov/msprog/dms/filenamingconvention_02_23_2012.pdf)

# Metadata

OpenEDMS 3.8

Search Documents by All  Search

Documents

Workflows

Mail Box

News Board

Calendar

Create File

Metadata

Document Class(es)

Complete CBI Application-Common Section  
Correspondence  
FOIA Application  
FOIA Application - Common Section  
Publications  
Reports

Selected Document Class(es)

Complete CBI Applications Engine Family Specific



Complete CBI Applications Engine Family Specific

\* Manufacturer:

\* Model Year:

\* Application Type:

\* Engine Family:

\* Vehicle Class:

\* Submission Date: Generated By System

OK

Reset

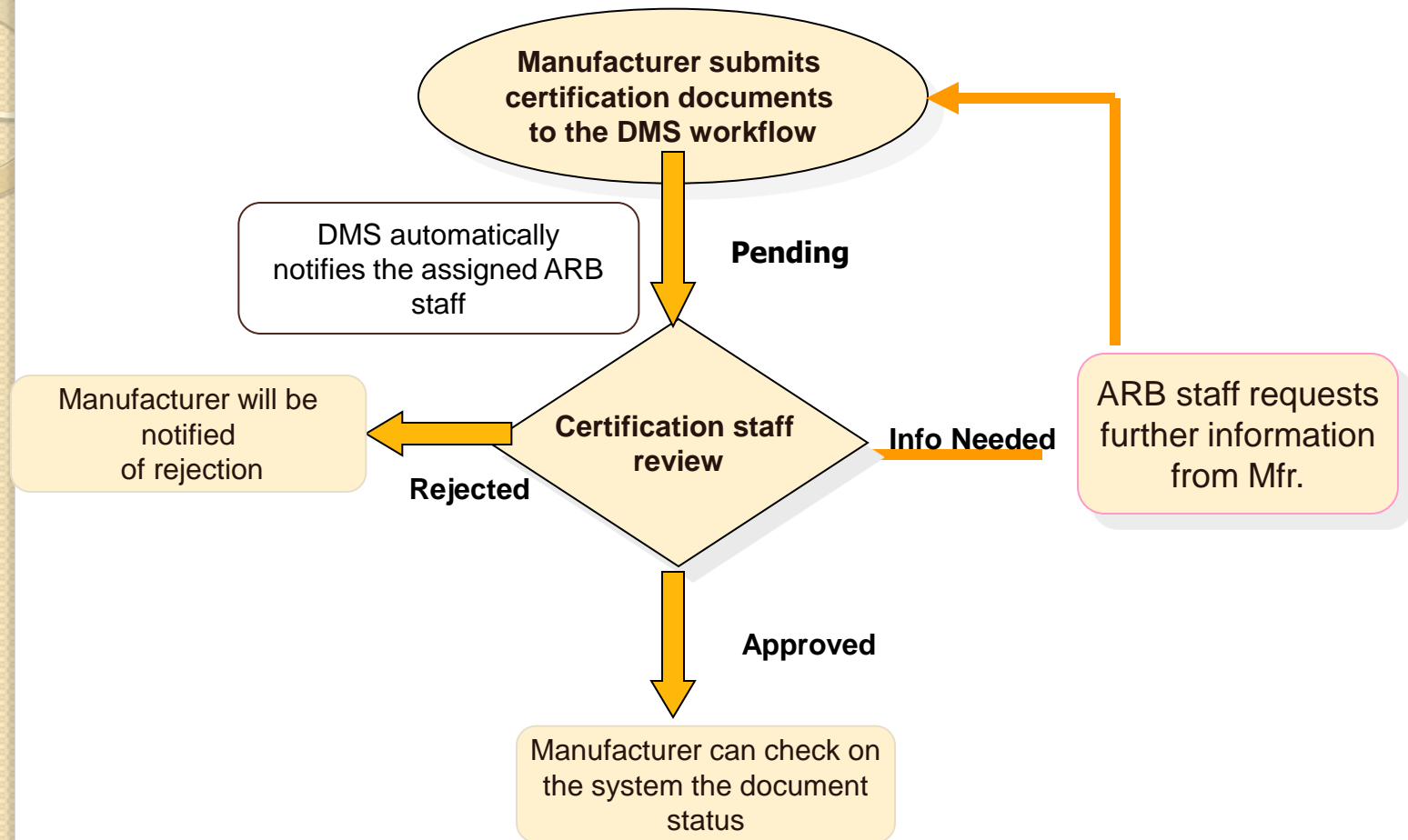
Upload

Back

# File Naming and Metadata

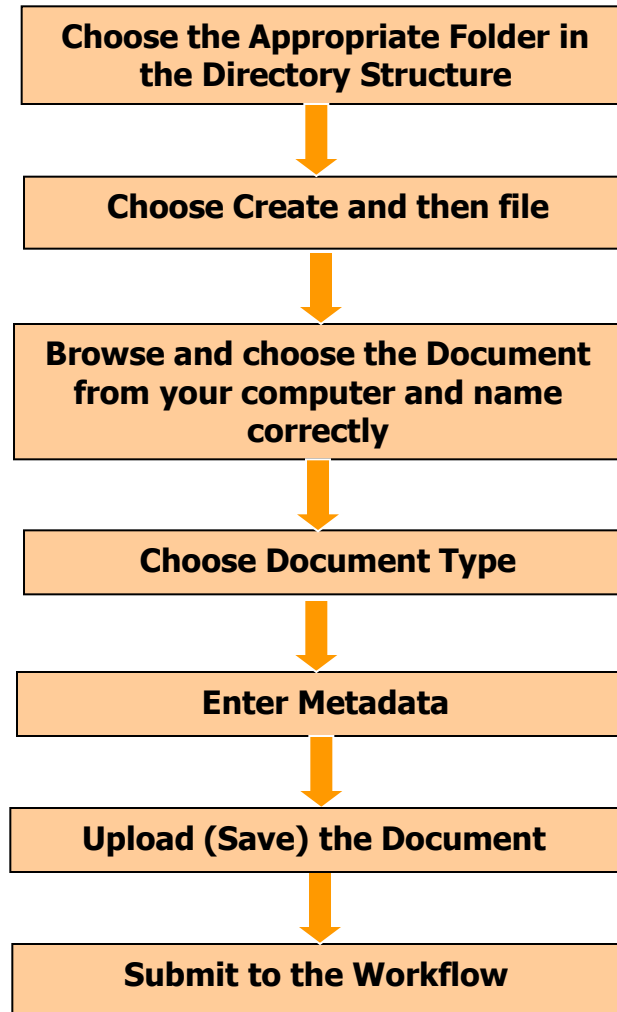
- Things to Remember
  - Documents should be uploaded into appropriate folders
  - Documents need to be named correctly – refer to the file naming convention documents on our website
  - The correct “Document Class/Type” must be selected to enter metadata
  - Metadata must be entered in order to upload a document to DMS
  - The metadata and the file name can be edited after the document is uploaded

# Workflow Process





# Major Steps of Document Submission to the ARB DMS



# Workflow Submission

- For the application workflow –
  - “One” workflow process should include application and supporting documents from only “one” engine family/test group
- Multiple documents can be submitted into a single workflow
- Additional documents can always be added to an open workflow

# Automatic Version Control

- Allows staff to retain documents and track changes made throughout the review process
- Uploading a document with the same name will automatically create a new version of the file
- If the file is in an open workflow, the new version will automatically be added to the workflow
- Do not use version control to submit running changes or field fixes; only submit new versions for open workflows

# Checking File Status

- As your document is processed the file status will be updated to reflect progress
- *Example demonstration*

# DMS

## Problems/Troubleshooting

- Contact your ARB certification representative when...
  - a document is uploaded into the wrong folder
  - a document is submitted to the wrong workflow process
  - changing manufacturer representatives
  - you need help naming files or workflow processes
  - you don't know how many documents or which documents to submit to a workflow process

# DMS

## Contact Information

- If you are experiencing DMS technical problems or have questions on how to use the document management system please contact:
  - James Pang (*Heavy Duty and OFCI*), (626) 450-6127, [spang@arb.ca.gov](mailto:spang@arb.ca.gov)
  - Michael Lin (*Off Road Spark Ignited*), (626) 459-4461, [clin@arb.ca.gov](mailto:clin@arb.ca.gov)
  - Kevin Curley (*Off Road Spark Ignited*), (626) 350-6418. [kcurley@arb.ca.gov](mailto:kcurley@arb.ca.gov)
  - Shobna Sahni (*On Road & Motorcycle*), (626) 450-6104, [ssahni@arb.ca.gov](mailto:ssahni@arb.ca.gov)
  - Tom Montes (*OBD*), (626) 575-6777, [tmontes@arb.ca.gov](mailto:tmontes@arb.ca.gov)

# Question and Answer

